Klarstig

# Banking Project Estimate

Prepare a preliminary estimate by recording the scope, assumptions and cost basis. An estimate is subject to confirmation after the scope and conditions are checked.

## Contact and reference

**Organization using this document**

**Your name or contact reference ***

**Email for a reply if needed**

## Information for this document

**Work to be estimated ***

**Expected deliverables ***

**Estimated billable units ***

**Unit basis such as hours or items ***

**Estimated rate per unit ***

**Currency ***

- ☐ USD
- ☐ EUR
- ☐ GBP
- ☐ CAD

☐ Other

**Other currency code if selected**

**Other estimated costs**

**Assumptions and exclusions ***

**Expected start and duration**

## Specific details

**Project name sponsor and phase**

Complete when relevant to this request.

**Scope milestones dependencies and acceptance criteria**

## Operating context

**Branch department or service reference**

Complete when relevant to this request.

**Authorized contact and handling requirements without account credentials**

## Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- No payment is taken by default. Online payment needs a connected payment account and is configured separately.
- Some questions become required only after certain answers. The printable version shows every question.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched

on until you configure them.

**Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.**

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